

TAX SHELTER ANNUITY INFORMATION

A 403(b) plan (tax-sheltered annuity plan or TSA) is a retirement plan offered by public schools and certain charities. It's similar to a 401(k) plan maintained by a for-profit entity. Just as with a 401(k) plan, a 403(b) plan lets employees defer some of their salary into individual accounts.

If you want to start a 403(b) plan, you may contact one of the Board approved vendors below. Once we are notified of your decision, we will start making payroll deductions per your agreement with the TSA company.

LINCOLN INVESTMENT PLANNING RETIREMENT

Alberto E. Gaglianese
856-596-4830 (2835)
1-800-375-1133 (2835)

AXA EQUITABLE

Doug Ballard
1-848-241-3237
Fax: 1-732-701-0026

VALIC

Mark Milewski
1-215-539-7602
mark.milewski@aig.com

Contribution limits are established by the IRS annually. You and your advisor will develop a retirement plan that is best for you. Whenever you want to change your deductions, you will call your advisor. Once the changes are approved by our third-party compliance administrator, we will then make the changes to your payroll deductions.

We use OMNI as an independent administrator dedicated to ensuring that 403(b) benefits operate in compliance with IRS regulations.

You can learn more about OMNI and establishing a 403(b) by setting up an appointment with an advisor or visiting omni.com.

